COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/Time Stamp

RECEIVED

SECRETARY OF THE SENATE

PUBLIC RECORDS

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Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

lame of Traveler: Megan Whittemor	
mploying Office/Committee: U.SSe	enator David Perdue
ravel Expenses Paid by (List all source	ces):Charitable Trusts
ravel Date(s):	019
	Private Sponsor Travel Certification Form, addendum, and itinerary
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urnose of Amendment (describe the r	eason for amending original submission): To provide the most up to
date and final version of the forms	
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10/16/2019	Megan Water of Traveler)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

. Spo	onsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
 . De	Senate Chiefs of Staff Management and Leadership Conference
 . Da	es of travel: September 13-15, 2019
	ce of travel: Annapolis, MD
	me and title of Senate invitees: Chiefs of Staff (see attached list)
I c	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
X	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
X	
	ertify that: The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. EAND
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Pew Charitable Trusts is the sole organizer and sponsor of this trip.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	See attachment.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	See attachment.
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See attachment.					
Total Expenses for Each Participant:					
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses	
	\$60/roundtrip	\$268	\$115.50		
⊠ Good Faith estimate					
Actual Amounts					
	rip involves an event that e trip involves an event t pation:				
participation or b) the congressional particip	e trip involves an event t	hat is arranged or or	ganized specifically v		
participation or b) the congressional particip	e trip involves an event t pation:	hat is arranged or or	ganized specifically v		
participation or b) the congressional participation. This trip has been are	e trip involves an event t pation:	hat is arranged or or egard to congression	ganized specifically v		
participation or b) the congressional participation. This trip has been are Reason for selecting	e trip involves an event the pation: ranged specifically with r	egard to congression	nal participation.	vith regard to	
participation or b) the congressional participation. This trip has been are Reason for selecting	e trip involves an event the location of the event	egard to congression	nal participation.	vith regard to	
participation or b) the congressional participation. This trip has been are Reason for selecting. Annapolis was selecting.	e trip involves an event the location of the event	egard to congression or trip mity to Washington,	nal participation.	vith regard to	
Participation or b) the congressional participation. This trip has been are Reason for selecting. Annapolis was selected with the congressional participation and location of the congressional participation.	e trip involves an event the pation: the location of the event ted due to its close proxi	egard to congression or trip mity to Washington, facility:	nal participation. DC and its historical	vith regard to	
Participation or b) the congressional participation. This trip has been are Annapolis was selected. Name and location of The Historic Inns of Annapolis was selected.	e trip involves an event to pation: ranged specifically with reted due to its close proxi f hotel or other lodging for Annapolis, 58 State Cir, 58	egard to congression or trip mity to Washington, acility:	nal participation. DC and its historical	vith regard to	
Participation or b) the congressional participation. This trip has been and Reason for selecting. Annapolis was selected. Name and location of the Historic Inns of the Reason(s) for selections.	e trip involves an event the pation: ranged specifically with respect the location of the event ted due to its close proxition of the proxition of the location of the event ted due to its close proxition.	egard to congression or trip mity to Washington, acility: Annapolis, MD 2140 facility:	nal participation. DC and its historical	significance.	

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:				
	Lodging and meals are at the federal per diem rate for Annapolis, MD.				
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22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:				
	Roundtrip transportation to Annapolis will be provided via coach charter buses.				
	·				
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).				
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:				
	None ·				
	<u> </u>				
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):				
	Signature of Travel Sponsor: Tawere Uttatto				
	Name and Title: Tamera Luzzatto				
	Name of Organization: The Pew Charitable Trusts				
	Address: 901 E Street, NW, Washington, DC, 20004				
	Telephone Number: (202) 552-2000				
	Fax Number: (202) 552-2299				
	E-mail Address: tluzzatto@pewtrusts.org				

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and Leadership Conference, September 13-15, 2019 Annapolis, MD

- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the seventh Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.



Bipartisan Senate Chiefs of Staff Conference Annapolis, Maryland | September 13-15, 2019



Friday, September 13, 2019

2:30pm Depart Dirksen via buses

3:30-4:30pm Maryland State House – Greeting by Senator Ben Cardin

The oldest American state house in continuous legislative use, dating to 1779, and the U.S. Capitol from November 26, 1783, to August 19, 1784. Senator Cardin will welcome chiefs to his state capital and speak about his legislative experiences working

across the aisle.

4:30pm Walk to the Historic Inns of Annapolis.

Luggage retrieval and hotel check-in.

6:00-8:00pm Dinner – Governor's Mansion with visit by Governor and

Mrs. Hogan.

Governor Lawrence J. Hogan, Jr. was sworn in as the 62nd governor of the State of Maryland on January 21, 2015. In 2018, he was re-elected to a second four-year term. Maryland's first lady is Yumi Hogan, a first-generation Korean-American, artist and teacher. Governor Hogan will address his challenges and successes leading a politically-divided state government.

Saturday, September 14, 2019

8:30-9:30am Breakfast at your leisure, Calvert House, Historic Inns

9:30-11:00am Amy Mitchell, Pew Research Center

Americans' Views of Their Local News.

With an informed citizenry being essential to an effective democracy, where Americans get their news and their trust in those sources is critical. While much attention is paid to national cable news, a significant number of Americans still rely

on local sources for news and information. Amy Mitchell will discuss Pew's recent survey of 34,897 adults on their views of

local news and the implications for policymakers.

11:00am-11:30am Break

Conference Schedule

CQ

11:30am-1:00pm

Lunch

Captain Thomas Buchanan, 88th Commandant of Midshipmen, United States Naval Academy

Commandant Buchanan will provide chiefs with an overview of the Academy's mission and walk through the four-year cycle of a Midshipman. Because Senators are given the opportunity to make nominations, he will also provide insights into the qualities sought by the Academy in the admissions process.

1:15-2:45pm

Professor Joanne Freeman (Yale University)

The Field of Blood: Violence in Congress and the Road to Civil War.

Professor Freeman recovers the long-lost story of physical violence on the floor of the U.S. Congress. Drawing on an extraordinary range of sources, she shows that the Capitol was rife with conflict in the decades before the Civil War. Professor Freeman will bring historical context and insight to today's partisan and factional challenges in Congress.

2:45-3:00pm

Break

3:00-4:30pm

David Pogue (The New York Times and CBS Sunday Morning)

A.I., Robotics, and America in 2050.

From 2000 to 2013, David Pogue was the New York Times weekly tech columnist. After a five-year detour to Yahoo Finance, he's now he's back at the Times, writing the "Crowdwise" feature for the "Smarter Living" section. He's a four-time Emmy winner for his stories on "CBS Sunday Morning," and a host of 17 science specials on "NOVA" on PBS. David will talk about the latest advances in artificial intelligence and robotics and the implications for policy makers, the U.S. economy, government, and society as a whole.

6:30-8:00pm

Dinner

Keynote Speaker - Derrick Wang, composer, "Scalia/Ginsburg"

(U.S. Naval Academy Officers Club)

Derrick Wang serves on the faculty of the Peabody Conservatory of The Johns Hopkins University, where he designs and teaches interdisciplinary courses on music and law and lectures on the power of the arts to transcend political divides. Derrick will speak about the unexpected and unique bipartisan relationship between Supreme Court Justices Antonin Scalia and Ruth Bader Ginsburg centered around their shared appreciation for opera and lessons which can be learned and applied to the legislative branch. He will also share a few selections from his opera, "Scalia/Ginsburg" which was written using the actual words and opinions of the two justices.

Sunday, September 15, 2019

8:00-9:30am Breakfast at your leisure, Calvert House, Historic Inns - Bag Call

9:30-11:30am Ira Chaleff

The Courageous Chief of Staff: The Art of Providing Guidance and

Feedback to the Senator

Ira Chaleff, Chairman Emeritus of The Congressional Management Foundation, and author of the award-winning book "The Courageous Follower: Standing Up To and For Our Leaders", will do a reprise of the well-received talk he gave at the 2009 Chiefs of Staff conference. While each Senator is unique, as is the relationship with the Chief, there are certain commonalities that occur in the exercise of power. These require close advisors to use courage and skill to minimize blind spots and maximize success. Ira will examine these with the chiefs and offer approaches to add to the existing tool kits the chiefs have developed.

12:00pm Pick up box lunches

12:15pm Buses depart

1:30pm Arrive Capitol Hill

2019 Bipartisan Senate Chiefs of Staff Conference September 13-15, 2019 List of Invited Staff

	First Name	Last Name	Senate Office
'	Steve	Abbott	Sen. Susan M. Collins
	Michelle	Altman	Sen. James P. Lankford
	Michelle	Barlow Richardson	Sen. Roger F. Wicker
	Allyson	Bell	Sen. Mike Lee
	Reynaldo	Benitez	Sen. Catherine M. Cortez Masto
	Sarah	Benzing	Sen. Sherrod C. Brown
	Cassie	Bladow	Sen. John H. Hoeven III
	Tony	Blando	Sen. Ron H. Johnson
	Daniel	Brandt	Sen. Pat J. Toomey
	Joe	Britton	Sen. Martin T. Heinrich
	Brennen	Britton	Sen. Jerry Moran
	Joel	Brubaker	Sen. Shelley Moore Capito
	Jami	Burgess	Sen. Maria Cantwell
	Larry	Burton	Sen. Dan S. Sullivan
	Neil	Campbell	Sen. Jack F. Reed
	Joi	Chaney	Sen. Kirsten E. Gillibrand
	Steve	Chartan	Sen. Ted Cruz `
	David	Cleary	Sen. Lamar Alexander .
	Dara	Cohen	Sen. Jacklyn S. Rosen
	Caryn	Compton	Sen. Bernie Sanders
	John	Connell	Sen. Todd C. Young
	Kathleen	Connery Dawe	Sen. Angus S. King Jr.
	Jackie	Cottrell	Sen. Pat Roberts
	Doug	Coutts	Sen. Tom Cotton
	Aaron	Cummings	Sen. Chuck Grassley
	Dayne	Cutrell	Sen. Richard C. Shelby
	Jonathan	Davidson	Sen. Michael F. Bennet
	Jennifer	DeCasper	Sen. Tim E. Scott
	J.P.	Dowd	Sen. Patrick J. Leahy
	Eric	Einhorn	Sen. Brian E. Schatz
	Kaitlin	Fahey	Sen. Tammy Duckworth
	Eric	Feldman	Sen. Gary C. Peters
	Charles	Flint	Sen. Marsha Blackburn
	Kristen	Gentile	Sen. Bob Casey
	Lisa	Goeas	Sen. Joni K. Ernst
	Marc	Goldberg	Sen. Maggie Hassan Sen. Sheldon Whitehouse
	Samuel	Goodstein	
	David	Grannis	Sen. Daug Jones
	Dana	Gresham	Sen. Doug Jones Sen. Kevin J. Cramer
	Mark	Gruman	Jen, Revins, Clamer

2019 Bipartisan Senate Chiefs of Staff Conference September 13-15, 2019 List of Invited Staff

First Name	Last Namo	Senate Office
First Name	Last Name	
Joe	Hack	Sen. Deb Fischer
Coti	Haia	Sen. Mazie K. Hirono
Mike	Harney	Sen. Mark R. Warner
Patrick	Hayes	Sen. Joe Manchin III
William	Henderson	Sen. Rand Paul
Mike	Henry	Sen. Tim M. Kaine
Allison	Herwitt	Sen. Chris S. Murphy
Natasha	Hickman	Sen. Richard M. Burr
Toni-Marie	Higgins	Sen. John N. Boozman
Luke	Holland	Sen. James M. Inhofe
John	Insinger	Sen. James E. Risch
Mark	Isakowitz	Sen. Rob J. Portman
Beth	Jafari	Sen. John Cornyn III
Mark	Johnston	Sen. Mike Rounds
Meg	Joseph	Sen. Kyrsten Sinema
Joshua	Kelley	Sen. Mike Braun
Joel	Keisey	Sen. Richard Blumenthal
Joan	Kirchner Carr	Sen. Johnny Isakson
Coy	Knobel	Sen. Mike B. Enzi
Rohini	Kosoglu	Sen. Kamala D. Harris
Chad	Kreikemeier	Sen. Jeanne Shaheen
Dan	Kunsman	Sen. John A. Barrasso
Dylan	Laslovich	Sen. Jon Tester
Ted	Lehman	Sen. Thom R. Tillis
Mindi	Linquist	Sen. Patty Murray
Jeff	Lomonaco	Sen. Tina Smith
Christopher	Lynch	Sen. Ben L. Cardin
Michael	Lynch	Sen. Charles E. Schumer
Becky	Marr	Sen. John Thune
Philip	Maxson	Sen. Mitch McConnell
Stacy	McBride	Sen. Roy D. Blunt
Jeffrey	Michels	Sen. Ron Wyden
Anne	Morris Reid	Sen. Elizabeth A. Warren
Bill	Murat	Sen. Tammy Baldwin
Mike	Needham	Sen. Marco Rubio
Ryan	Nelson	Sen. John Thune
Bianca	Ortiz-Wertheim	Sen. Tom S. Udall
Marli	Pasternak	Sen. Ben Cardin
Mike	Pawlowski	Sen. Lisa A. Murkowski
Elizabeth	Peluso	Sen. Amy Klobuchar

2019 Bipartisan Senate Chiefs of Staff Conference September 13-15, 2019 List of Invited Staff

First Name	Last Name	Senate Office
Richard	Perry	Sen. Lindsey Graham
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Sydney	Reed	Sen. Pat Roberts
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred -	Turner	Sen. Bob Menendez
Matt	Van Kuiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley



Bipartisan Senate Chiefs of Staff Conference Annapolis, Maryland | September 13-15, 2019



Bipartisan Senate Chiefs of Staff Conference

The Pew Charitable Trusts

Invites You and Your Spouse/Significant Other
To the 7th Biennial

Senate Chiefs of Staff Management and Leadership Conference

Annapolis, Maryland September 13-15, 2019

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 13-15, 2019, in Annapolis, Maryland. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the agenda is attached.

We will depart from behind the Dirksen Building on Friday, September 13, on a chartered bus and return on Sunday, September 15. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$175) after the conference.

Your pre-travel paperwork is due to the Select Committee on Ethics, 220 Hart, <u>no later than Wednesday</u>, August 14, 2019. You do not need to list accompanying spouses/significant others on the ethics form. Click here to download the paperwork.

Click here to register

If you are unable to attend, please <u>click here</u>.

We look forward to seeing you in historic Annapolis this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501